Salesloft Setup Guide

This document outlines the required initial setup steps in the external system for the Vertify integration.

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SETUP GUIDE OVERVIEW

This setup guide will require the system administrator to complete steps outlined below in order to connect the external system application with Vertify.

Please note, this document may be subject to change and additional information required. Partnership with system administrator and/or support team may be necessary.

OPTIONAL STEP: VERTIFY USER ACCESS

Please create an Admin user for the integration and provide the following credentials to your Vertify Implementation Specialist if you'd like them to have access to your CRM's UI. It is preferred that users are created with an Administrator role to ensure that no permissions errors are encountered during the implementation.

Follow this format when creating the log in: passwords+clientname@vertify.com

Example: passwords+vertify@vertify.com

If license/seat is unavailable, it can also be created through a personal account. Please note, it will need to be updated if the user or password is inactivated.

STEP 1: CUSTOM FIELD CREATION

Custom fields are required in the endpoint system for the Vertify integration. Please create these fields on any tables or objects such as Leads, Contacts, or Accounts. Reference the API Name column in the table below for the list of how to title the fields, the needed data type, and the purpose of the field for context.

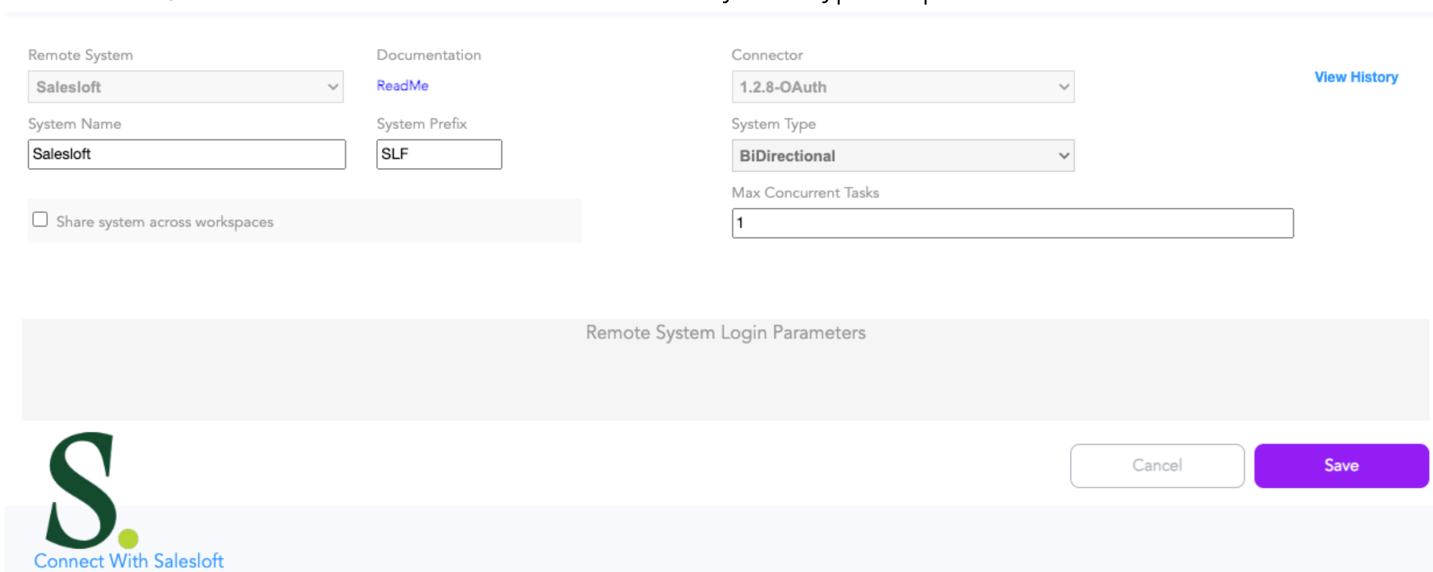
API Name	Data Type	Purpose
CRMContactId	String	This field will be used to house the source Contact's internalId, and for merging and lookup purposes in Vertify.
CRMCompanyId	String	This field will be used to house the source Company's internalId, and for merging and lookup purposes in Vertify.
CRMRecordType	String	This field will be used on the Person record to house the static value hard-coded by Vertify. It's used to denote the type of record currently in sync with the CRM and for filtering in Vertify.
SyncToVertify	Boolean	This field will be hard-coded by Vertify or by a workflow in the system. It is used to determine which records are eligible to move back to the other endpoint(s) and for filtering in Vertify.

STEP 2: CREATING A USER ACCOUNT IN SALESLOFT

1. Please log into the system with your normal credentials.
2. Create a new User Account that has Admin privileges.
    a. It should never be deactivated or deleted, and one that can be logged into in order to complete the connection process.
    b. Please use this naming convention for an email: passwords+TENANTNAME@vertify.com
3. Once the user is created, please log out of your personal account, and log back in with the newly created credentials to ensure it's ready to be used.

STEP 3: OAUTH SETUP IN VERTIFY

1. Navigate to your Vertify tenant site provided by your Customer Success Manager.
    a. Reach out to them directly if you have any questions or need assistance.
    b. Follow the reset password link to pick a permanent password for your account.
2. On the main **Dashboard**, click **Workspaces**.
3. Click the Workspace link you want to create a system in.
4. Click **New System**.
5. Select **Salesloft** from the Remote System dropdown menu, the **latest version of the Connector** should be defaulted, and then choose **BiDirectional** from the System Type dropdown.



6. Click **Save**.
7. A box will display at the bottom with a link underneath that says "**Connect With Salesloft**".
8. If logged into the User Account created for the integration, it should navigate to a page that will have a "Grant Access" button to select.
    a. If not logged into that account already, it will navigate to a page to log into the correct user account or choose the account to grant access to
9. Click the **orange button** to connect the Vertify App with your Salesloft instance.
10. When you return back to Vertify, click **Save** at the bottom right-hand corner of the page.

11. Click Connect - please note that the new system will display in orange and the status will be 'Scan Failed'. That's normal!
12. Click the arrow on the far left-hand side to expand the error message, and click the check box. Press Scan again. When it completes, you should see a Scan Complete status update.
13. Let your Vertify specialist know when this is completed!